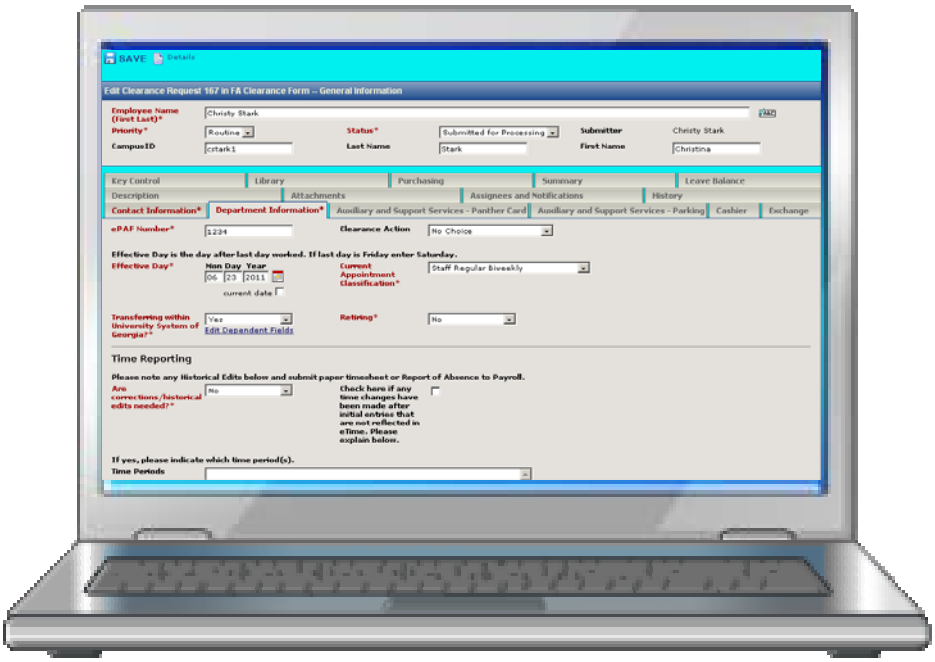
Training Manual

For

Online Clearance Form



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Chapter 1 Introduction

Employees must return all University property and pay all outstanding balances before last day of employment. The Clearance Form is used to help facilitate the process. The Clearance Form can be completed using the paper or electronic version. The information collected on both versions is similar, but the process is different.

Clearance Form Process

Note: Administrative areas for the Clearance Form are Library, Key Control, Purchasing, Exchange, Parking, Panther Card, and Cashier's Office.

Paper Version of the Clearance Form

The paper version of the Clearance Form usually starts and finishes on the last day of employment. The employee's home department obtains the form and completes the Department section. The employee then walks the form around campus obtaining signatures from all Administrative areas. All University equipment must be returned and all fines paid at this point. If something is not returned, it will be noted on the form along with how much is owed. Once the employee obtains all the needed signatures the employee will walk the form the to the Benefits office. Payroll will process the form taking any money owed to the University out of the employee's last paycheck, or vacation payout. If neither option is available, a letter will be mailed to the employee and the information may be sent to collections. For more information on the paper version of the Clearance Form please contact the Payroll office.

Online Version of the Clearance Form

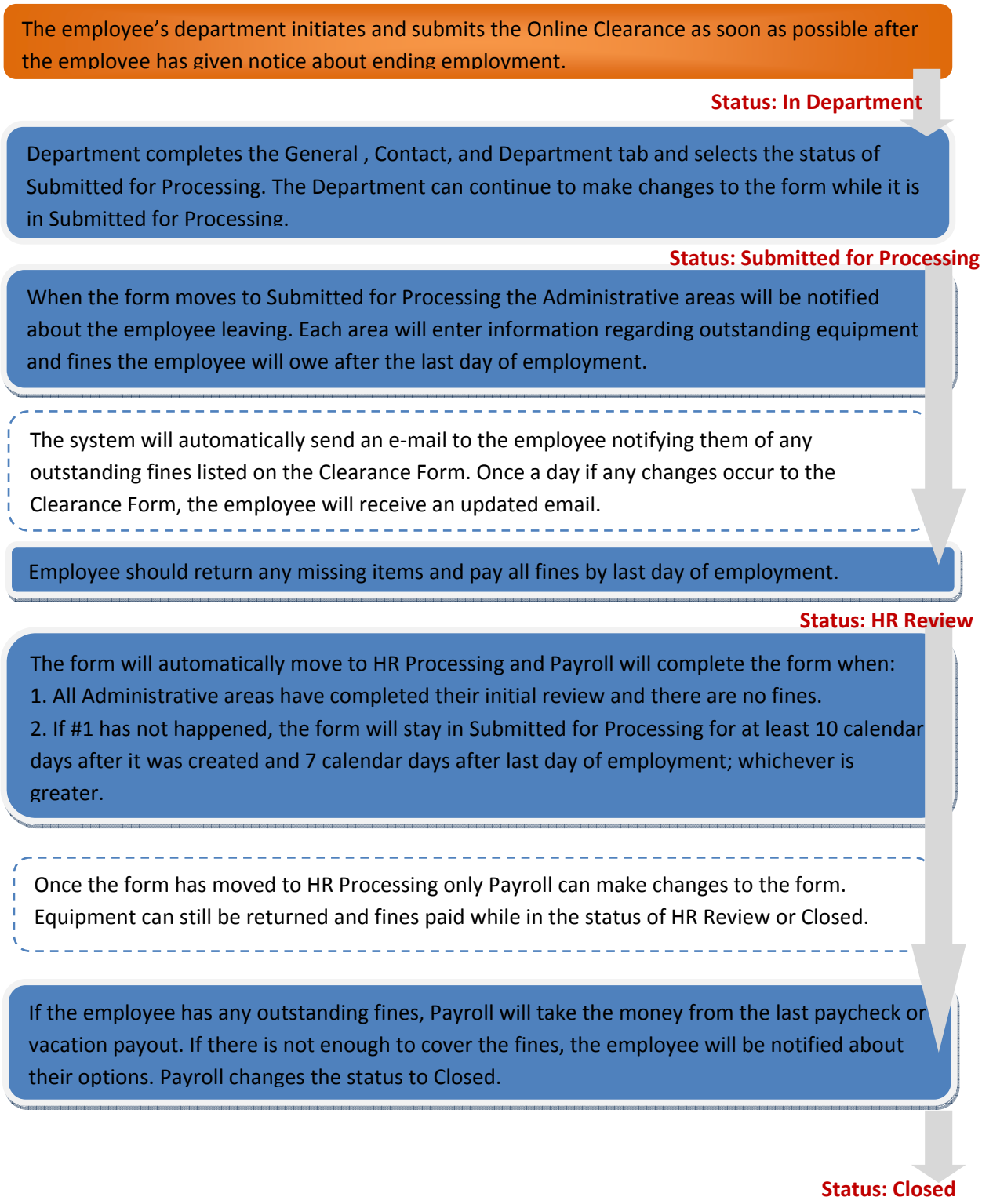
The employee's home department initiates and submits the Online Clearance Form as soon as possible after the employee has given notice. When the department has completed the initial review, the form is automatically sent to the Administrative areas for processing. These areas will list any outstanding equipment or fines. Once a day if there are any updates made to the Clearance Form the employee will be notified by email.

The employee should return all equipment and pay all fines by the last day of employment. When the employee returns equipment or pays any outstanding balances, departments and Administrative areas can make changes to the form as long as Payroll is not processing it.

After the last day of employment, Payroll will process and complete the form taking any money owed to the University out of the last paycheck or vacation payout. The money collected will be journal back to the area in which the fine is owed. If there is not enough money to cover the amount owed, the employee will be notified about their options.

Process Overview

The following figure illustrates how the Online Clearance Form is processed.
Administrative areas: Library, Key Control, Purchasing, Exchange, Parking, Panther Card, and Cashier's Office.


The employee's department initiates and submits the Online Clearance as soon as possible after the employee has given notice about ending employment.
Status: In Department
Department completes the General , Contact, and Department tab and selects the status of Submitted for Processing. The Department can continue to make changes to the form while it is in Submitted for Processing.
Status: Submitted for Processing
When the form moves to Submitted for Processing the Administrative areas will be notified about the employee leaving. Each area will enter information regarding outstanding equipment and fines the employee will owe after the last day of employment.
The system will automatically send an e-mail to the employee notifying them of any outstanding fines listed on the Clearance Form. Once a day if any changes occur to the Clearance Form, the employee will receive an updated email.
Employee should return any missing items and pay all fines by last day of employment.
Status: HR Review
The form will automatically move to HR Processing and Payroll will complete the form when:
1. All Administrative areas have completed their initial review and there are no fines.
2. If #1 has not happened, the form will stay in Submitted for Processing for at least 10 calendar days after it was created and 7 calendar days after last day of employment; whichever is greater.
Once the form has moved to HR Processing only Payroll can make changes to the form. Equipment can still be returned and fines paid while in the status of HR Review or Closed.
If the employee has any outstanding fines, Payroll will take the money from the last paycheck or vacation payout. If there is not enough to cover the fines, the employee will be notified about their options. Payroll changes the status to Closed.
Status: Closed

Security Access

For all security access, besides Employee Security, please complete the Security Access form found on the HR webpage: **http://www.gsu.edu/hr/30439.html**

Employee Security: All employees will automatically be able to view the Online Clearance Form after it has been created for them using their Campus ID and Password. If the Campus ID has been shut off, the employee will not be able to log into the system, but will still be able to receive emails to the address listed on the form.

Department Security: Allows a user to input and view all employees Clearance Forms for a department or a business unit.

Administrative Security: Allows a user from select administrative offices (i.e. Cashier, Exchange, Key Control, Library, Panther Card, Parking, and Purchasing) access to process information regarding what is owed to their area. This access can only be granted to employees who work in the specified offices.

Payroll Security: This security provides access to process the form while it is in the status of HR processing and ability to move it to complete. This access can only be granted to employees of Payroll.

Payroll Manager Security: This security provides access to move the form from Complete to HR processing. Used rarely when an employee returns equipment after the form has been completed. This access can only be granted to Payroll Managers.

Need Additional Help?

Administrative Areas: For questions about equipment and fines owed to a specific area, please contact the area directly.

Parking: (404) 413-9500
Panther Card: (404) 413-9508
Library: (404) 413-2820
Cashier: (404) 413-3251
Purchasing: (404) 413-3150
Key Control: (404) 413-3233
Exchange: (404) 413-4700

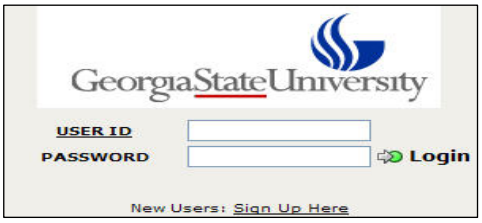
Payroll: (404) 413-3300 For payroll questions about the Clearance Form.

General Help Desk: (404) 413-4357 For questions about Campus ID and password.

Training: Additional training materials can be found at:
http://www.gsu.edu/hr/payroll/online-clearance-form-training.html

Chapter 2: Login to the Online Clearance Form

Step 1. Open an Internet browser and enter the following URL:
http://www.gsu.edu/hr/payroll/online-clearance-form.html
Next Select Logon to Online Clearance Form on the Right side of the page under Related Links.



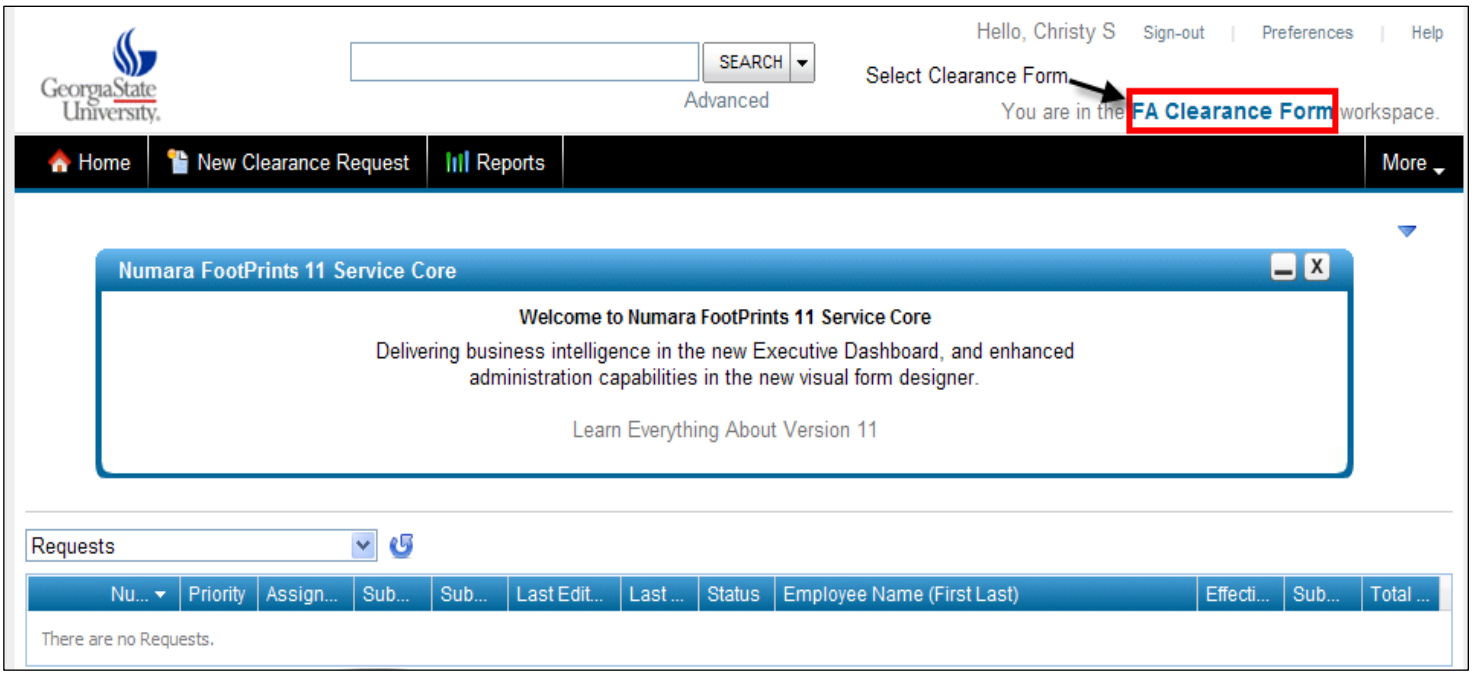
Step 2. Enter User Name and Password:

- Enter your Campus ID in the User ID box
- Enter your Campus ID password in the Password Box
- Select Login

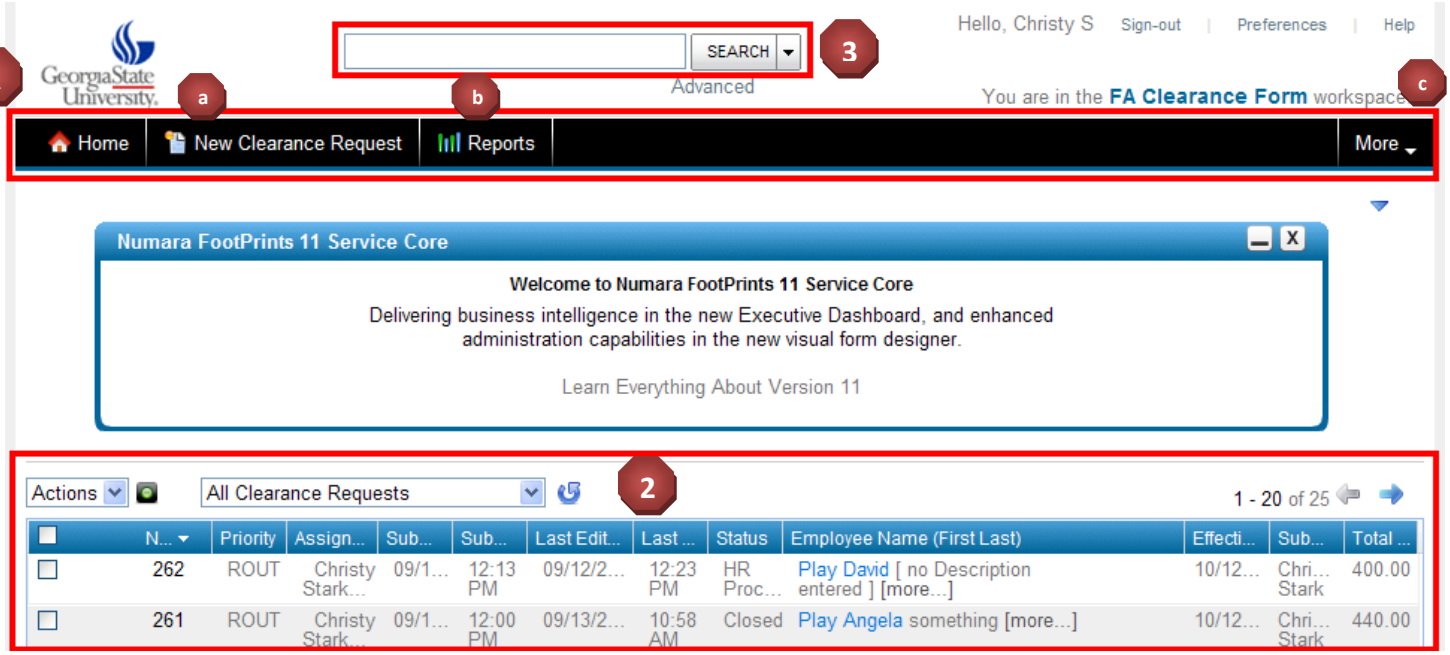
  Note: If this is your first time loging into the system it may request you to enter your information twice or use the New Users Sign Up Here link below.

Step 3.

- After logging in, if the system does not show Clearance Form at the top right, click on the blue words and select Clearance Form (See picture below).



Chapter 2: Overview of the Clearance Form Home Page


1
a
b
3
c
SEARCH
Advanced
Hello, Christy S
Sign-out
Preferences
Help
You are in the FA Clearance Form workspace
Home
New Clearance Request
Reports
More
Numara FootPrints 11 Service Core
Welcome to Numara FootPrints 11 Service Core
Delivering business intelligence in the new Executive Dashboard, and enhanced administration capabilities in the new visual form designer.
Learn Everything About Version 11
Actions
All Clearance Requests
2
1 - 20 of 25
N... Priority Assign... Sub... Sub... Last Edit... Last ... Status Employee Name (First Last) Effecti... Sub... Total ...
262 ROUT Christy Stark... 09/1... 12:13 PM 09/12/2... 12:23 PM HR Proc... Play David [no Description entered] [more...] 10/12... Chri... Stark 400.00
261 ROUT Christy Stark... 09/1... 12:00 PM 09/13/2... 10:58 AM Closed Play Angela something [more...] 10/12... Chri... Stark 440.00

1 The **Navigation Panel** provides easy access to major tasks of Creating Clearance Request, running Reports and Knowledge Base.

a **New Clearance Request:** Will initiate a new Online Clearance form. After the form has been created and saved, it will be displayed in area 2

b **Reports** section provides access to saved reports.

c **Knowledge base** has helpful instructions and solutions for Numara. The Knowledge base can be found under the MORE dropdown on the right side.

2 **Display Section** shows all the Online Clearance Forms that you have created or have been assigned to you.
Note: Once the form has been completed, it will be removed from the list. To find a form that has been completed use the search function in area 3

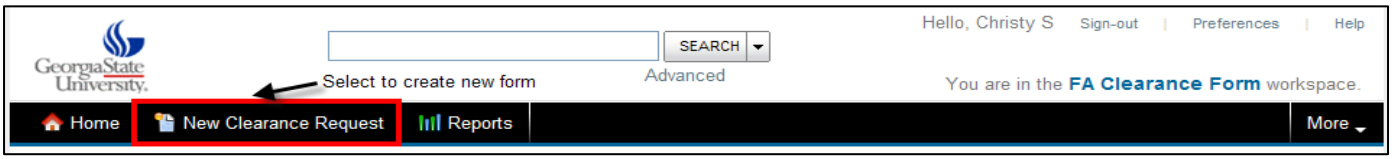
3 **Search** allows you to find a clearance Form by using employee's name, keyword, or number.

Disclaimer: The Online Clearance Form uses Numara. Therefore, not all functions that Numara supports are active in the Form. It you are interested in finding more about Numara, please contact IS&T.

Chapter 3: Department Initiate a Clearance Form

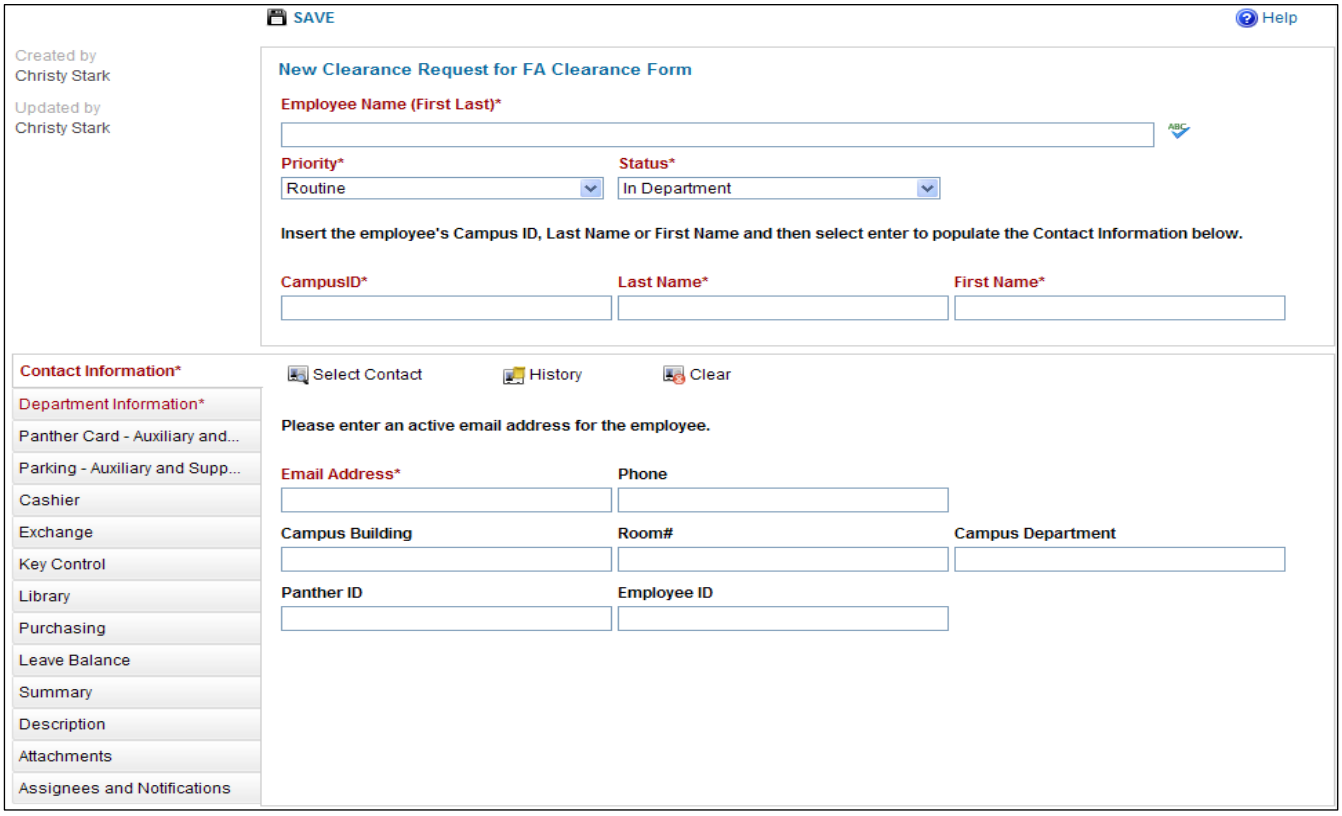
The employee's home department initiates and submits the Online Clearance as soon as possible after the employee has given notice of termination.

I. Navigation:



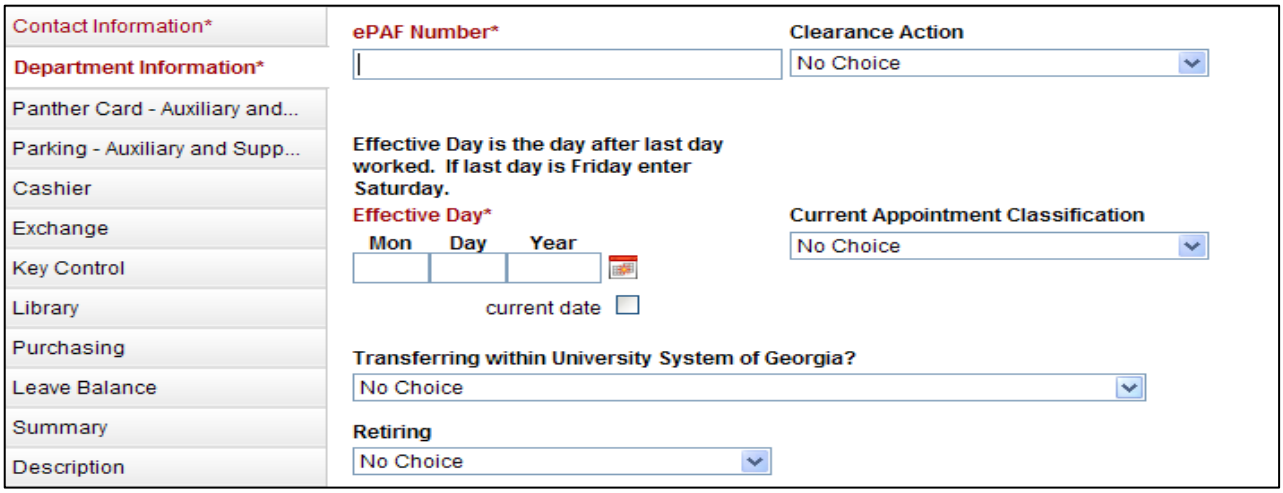
Step 1	New Clearance Request	• Click on the New Clearance Request tab to start a new form. **Note**: The first time you create a form it may ask your permission to allow pop-ups. Please choose Always allow Pop-up
Note	After you click the Create Clearance Request button, they system may ask you to run a couple of times. After a few moments the form pictured below will appear.	

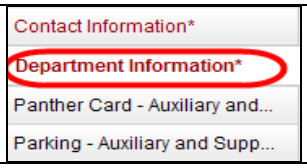
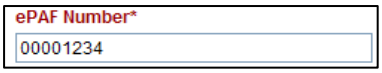
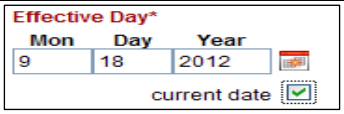
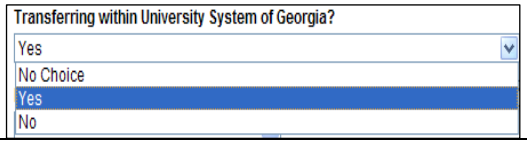
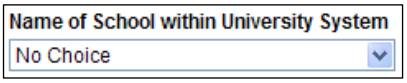
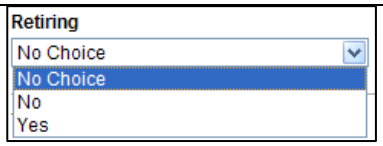
II. General and Contact Information Tab:



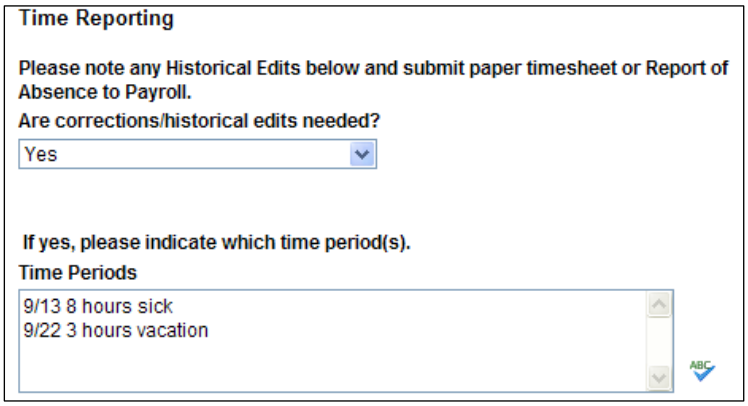
Step 1	Employee Name (First Last)*	• **Employee Name:** Enter employee's name (First, Last)
Step 2	CampusID* Last Name* First Name*	• Enter information into one field: **Campus ID, Last Name, or First Name** and **press Enter** • Select the correct employee if a list appears. • Once the employee is selected it will automatically populate the Contact Information Tab
Step 3	**Very Important Change Email Address** Email Address*	• **Change Email Address:** The system will send the employee email updates about what they owe. If the campus email address will be terminated soon enter another email address.

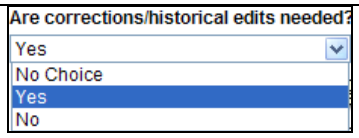
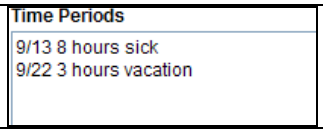
III. Department Information Tab: Initial Information



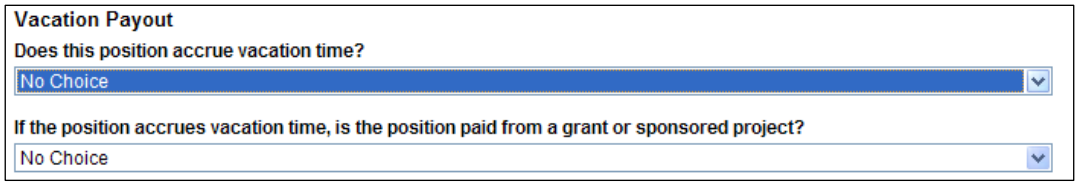
Step 1		• **Department Information:** Select Department Information Tab on left. • **Note:** Some users are set up for scrolling instead of tabs. Scroll down to the Department section.
Step 2		• **ePAF Number** : Enter the ePAF Number corresponding to the termination ePAF for the employee.
Step 3		• **Effective Day:** Select the date after the last day of employment. Example: if the employee terminates on a Friday, select Saturday. • **Note:** This date should match the date on the ePAF.
Note	After the ePAF number and the Effective Day have been entered, the form can be saved. **Important:** No other area can process the form until the Department Tab is completed and the status has changed to Submitted for Processing. For more information, please see page 12 *Submitting and Save*.	
Step 4		• **Current Appointment Classification**: Choose the employee's current Appointment Classification from the drop-down list.
Note	For more information about Appointment Classification, please visit the HR website http://www.gsu.edu/hr/	
Step 5		• **Transferring within University System of Georgia:** Choose **Yes** from the drop-down list if the employee is transferring within University System of Georgia or State Merit Agency. Otherwise, choose **No**.
		• If **Yes** is selected in Step 5**,** a question about Name of school within University System will pop up. • Click the drop-down list and select the institution that the employee is transferring to
Step 6		• **Retiring:** Select **Yes** or **No**. • **Note**: If the employee leaving is currently a Rehired Retire select Appointment Classification of Rehire Retiree and No for Retiring.

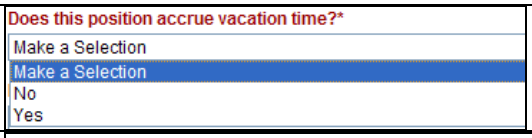
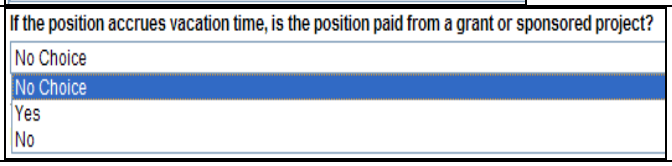
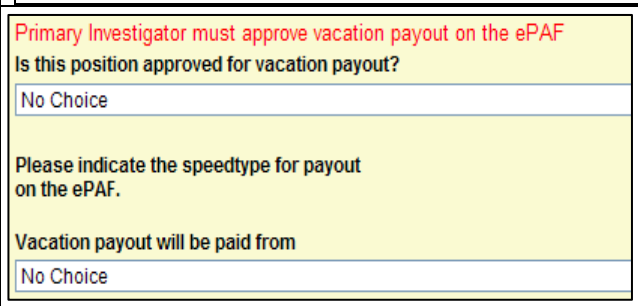
IV. Department Tab: Time Reporting Section



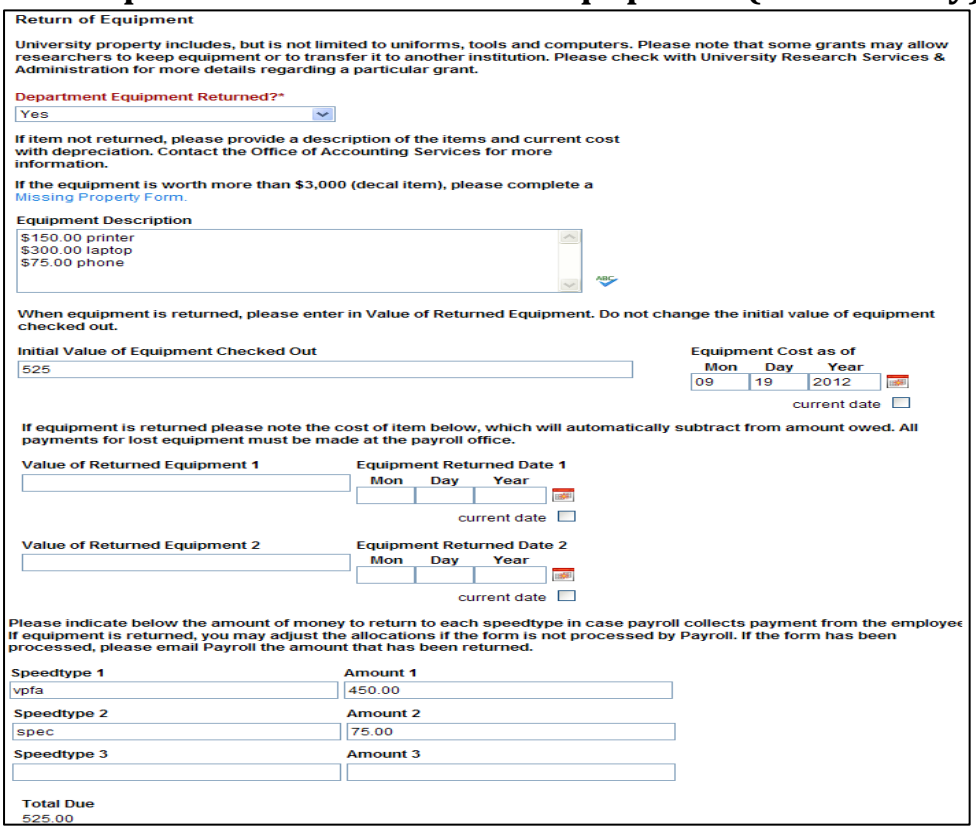
Step 1		• **Historical Edits:** Are there any changes to the employee" Vacation time, Sick Time or Hours Worked that cannot be entered into Etime? If so, select yes and explain the changes in the Time Period box.
Note	**A Timesheet or Report of Absence form must still be submitted to Payroll if changes cannot be entered into eTime.**	
Step 2		• **Time Periods:** Explain the changes in employee's time that has not been recorded in eTime. Please indicate the date and changes that needs to be made.

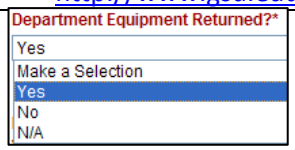
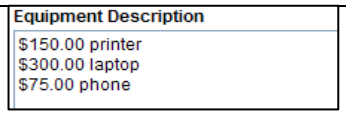
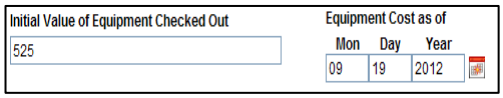
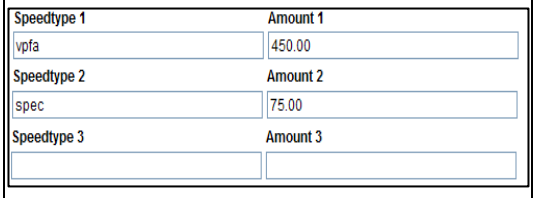
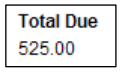
V. Department Tab: Vacation Payout Section



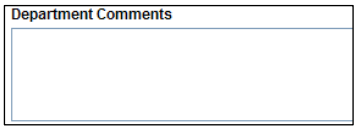
Step 1		• **Position Accrue Vacation Time:** Choose **Yes** or **No**.
Step 2		• **Position Paid From Grant:** If the position accrues vacation time and is paid from a grant or sponsored project, select **Yes** otherwise select **No.**
		If **Yes** is selected in Step 2, two additional questions will appear below. • **Approve for Vacation Payout:** Choose **Yes** or **No.** • **Vacation Payout will be paid from:** Choose **Paid From Grant** or **Not Paid From Grant** **Note**: PI must approve vacation payout and enter the speed type for payout on the ePAF.

VI. Department Tab: Return of Equipment (Initial Entry)

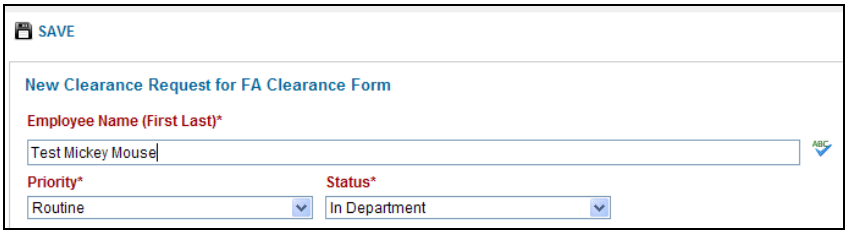

Return of Equipment
University property includes, but is not limited to uniforms, tools and computers. Please note that some grants may allow researchers to keep equipment or to transfer it to another institution. Please check with University Research Services & Administration for more details regarding a particular grant.
Department Equipment Returned?*
Yes
If item not returned, please provide a description of the items and current cost with depreciation. Contact the Office of Accounting Services for more information.
If the equipment is worth more than $3,000 (decal item), please complete a Missing Property Form.
Equipment Description
$150.00 printer
$300.00 laptop
$75.00 phone
When equipment is returned, please enter in Value of Returned Equipment. Do not change the initial value of equipment checked out.
Initial Value of Equipment Checked Out
525
Equipment Cost as of
Mon Day Year
09 19 2012
current date
If equipment is returned please note the cost of item below, which will automatically subtract from amount owed. All payments for lost equipment must be made at the payroll office.
Value of Returned Equipment 1
Equipment Returned Date 1
Mon Day Year
current date
Value of Returned Equipment 2
Equipment Returned Date 2
Mon Day Year
current date
Please indicate below the amount of money to return to each speedtype in case payroll collects payment from the employee
If equipment is returned, you may adjust the allocations if the form is not processed by Payroll. If the form has been processed, please email Payroll the amount that has been returned.
Speedtype 1
Amount 1
vpfa
450.00
Speedtype 2
Amount 2
spec
75.00
Speedtype 3
Amount 3
Total Due
525.00

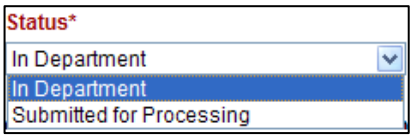
Notes	1. Enter information about department equipment that needs to be returned as a reminder to the employee. Equipment Returned Section can be updated later when employee returns equipment (page 14 *Edit Clearance Form* for more information). 2. If equipment belongs to a grant, check with University Research Service about specific details of the grant. 3. If the missing item is valued over $3000, complete **Missing Property Form**: http://www.gsu.edu/spectrum/38158.html	
Step 2		• **Department Equipment Returned:** Select **Yes,** if all Department equipment is returned. Otherwise, select **No.** • Choose **N/A** if employee has never borrowed any equipment.
Step 3		• **Equipment Description**: Enter a description and amount for each item that has not been returned. (For example, this employee has a printer, laptop, and phone checked out.)
Step 4		• **Initial Value of Equipment:** Enter the total value of equipment checked out when you initialize the form. In this case the total value of printer + laptop + phone= $525. • **Equipment Cost As of:** Enter the date information is entered.
Note	If equipment is returned, enter information in the *Value of Returned Equipment* box. **Do not change the *Initial Value of Equipment Checked Out box*. (**Please see page 14 Editing Clearance Form for more Information.)	
Step 5		Equipment can belong to multiple accounts. In this example the printer and laptop belong VPFA and the phone belong to SPEC. Use the Speedtype and corresponding amount boxes to specify where Payroll should journal money if payment is collected. • **Equipment Speedtype 1-3:** Enter speedtype/s for checked out equipment. If more than three are needed use comment field. • **Amount 1-3** Enter the amount owed to each speedtype.
Note		• **Total Due:** The total amount employee owes to the Department. **Calculate**: Initial Value of Equipment checked out minus Value of Returned Equipment and Equipment Payment.

X. Department Tab: Department Approval Section

Step 1		• **Department Comments:** Enter any additional information.
Step 2		• **Department Initial Review Completed:** Select **Yes** when initial entry of information has been entered. This will allow the status to change to Submitted for Processing. Information can still be change by the department. For more information see Save and Submitted for Processing section below.
Step 3		• **Department Number of Approver**: Enter Department Number.
Step 4		• **Phone Number:** Enter the phone number of department approver.

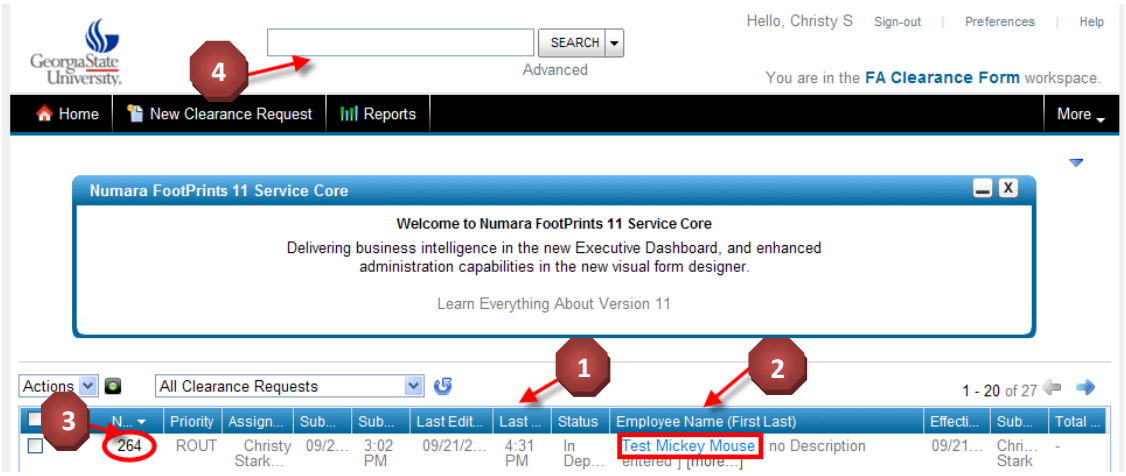
VIII. Submitted for Processing and Save - Top of Department Page



Step 1		• **Status:** At the top of the page under the Employee Name is the Status box. Select **Submitted for Processing**. • Department can still make changes when the form is in Submitted for Processing.
Step 2		• **Save:** Select Save at the top of the page above Employee Name. • **Be careful:** The form will let you exit without saving. You will lose all updates not saved. • You can save the form anytime after you complete the Contact Information Tab, the Epaf# and Effective Date. • If you select Submitted for Processing and Save you must complete all required fields on the Department Tab. • When you select save, an error message will appear if there is any missing any information.
Notes		• **Important: Please move the form to Submitted for Processing as soon as possible, this will provide additional time for the employee to process outstanding fines and equipment.** Selecting Submitted for Processing will open the form for Administrative areas (Library, Parking, Key Control, Exchange, Cashier, Panther Card, Purchasing) to being processing the form. • **Submitted for Processing will send an email to the employee letting him know he is leaving.** • If the status has not changed to Submitted for Processing in 3 days the initiator will receive reminder emails. • **Summary tab** is an easy way to view how much the employee owes. See page 20 for more information. • **History tab** shows everything that has happened to the form. See page 20 for more information

Chapter 4: Department Editing a Clearance

I. Department Tab: Finding and Opening the Clearance Form

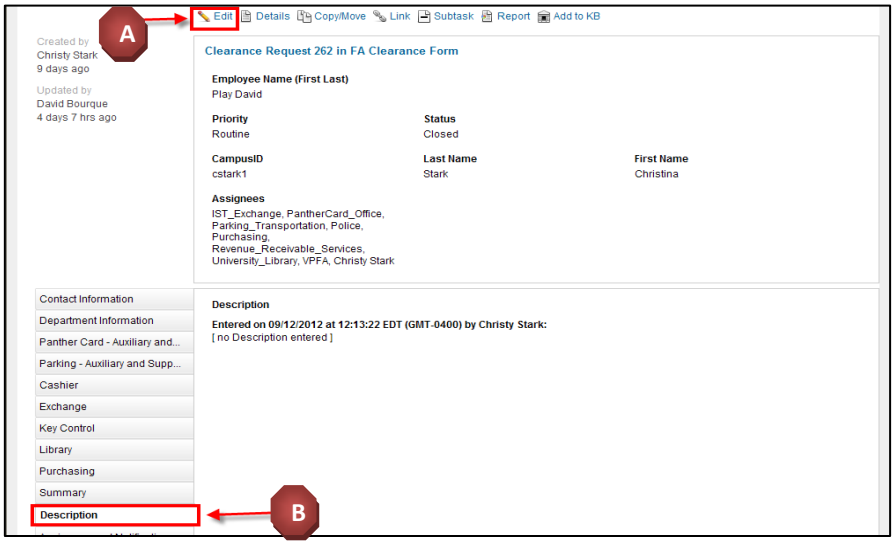


Finding a Clearance Form:

1. **Display Section:** The Display section lists all Clearance Forms that you have access to that have not been completed by HR.
2. **Employee Name:** and other titles above the list help to determine the correct Clearance Form for editing.
3. **Clearance Request #:** This shows a unique number assigned to each Clearance Form. By selecting on the number or employee name you can access and edit the Clearance Form.
4. **Search:** The search function narrows down the Clearance Form list, and will display closed forms that have been removed from your list.

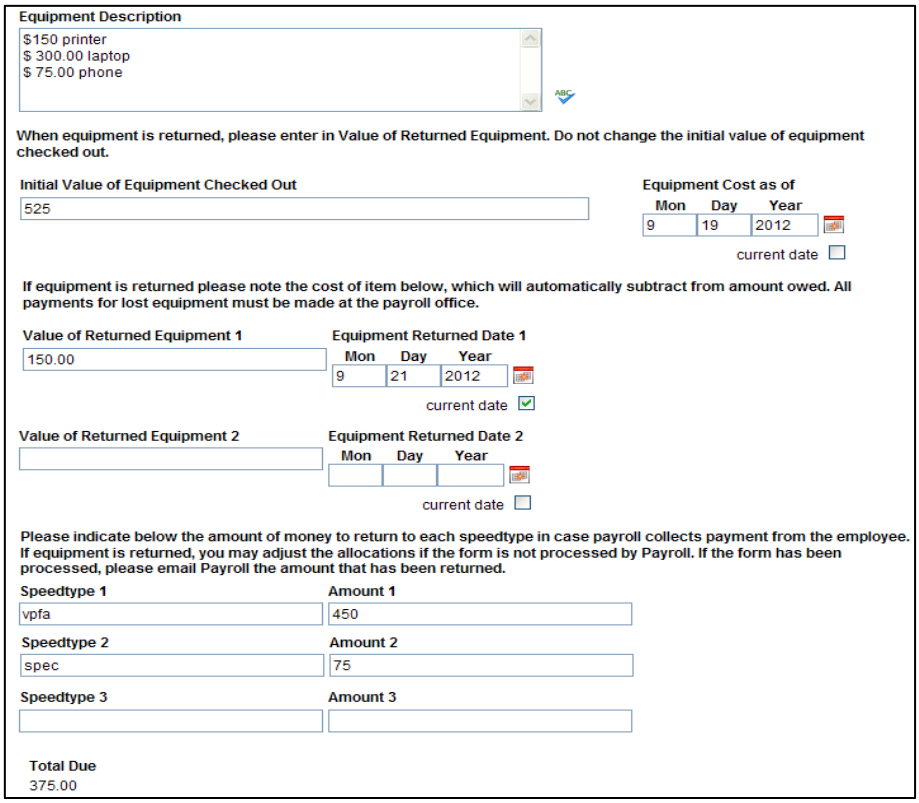
Opening Clearance Form:

1. A. Select the Clearance Form number or employee name to open the form. The form will always open on the Description Tab (shown below B) select desired tab to view information.
   Note: If you are if you are not an Administrator or Payroll you will only be able edit the Department and Contact Information Tabs.
2. If edit is shown at the top of the screen A select it to update the Department information tab.



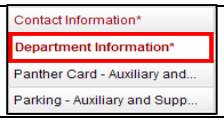
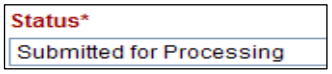
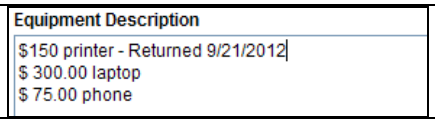
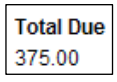
II. Department Tab: Employee Returns Equipment or Pays Fines

Note: The Department can edit any field on the Contact Information or Department Tab, while the status is "In Department" or "Submitted for Processing." When the form moves to "HR Processing" only Payroll can update the form.

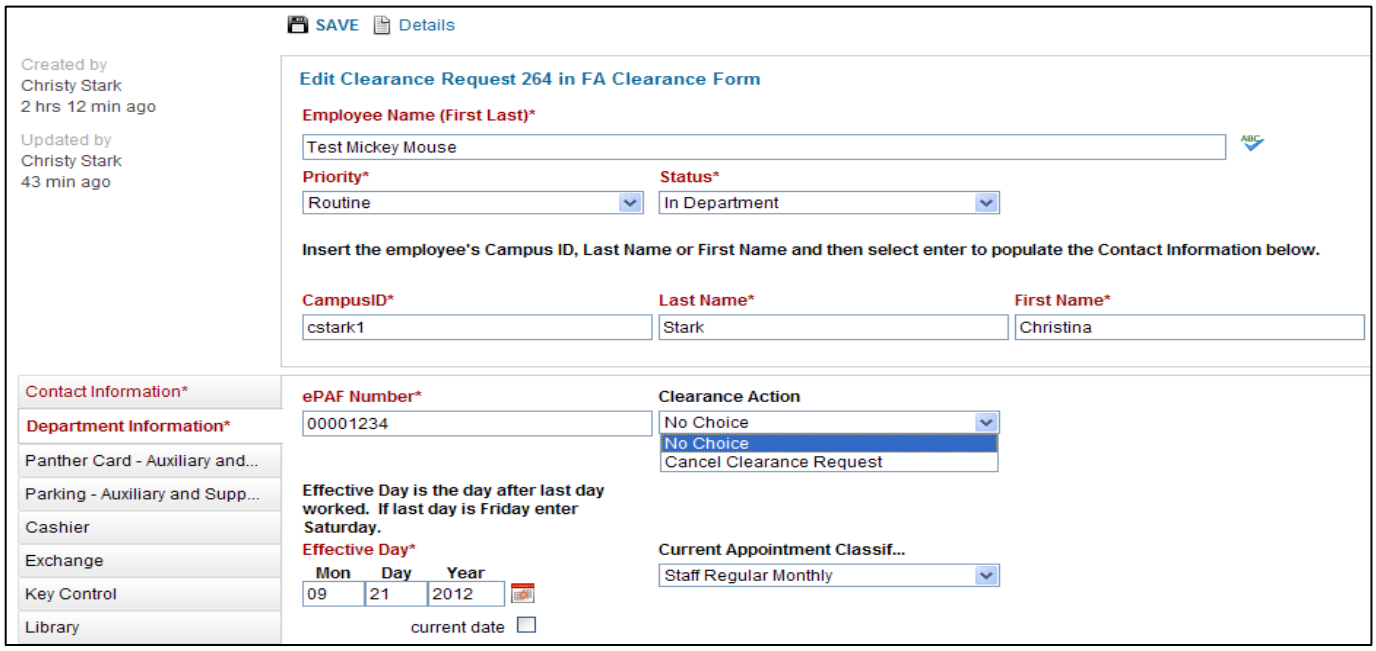

Equipment Description
$150 printer
$ 300.00 laptop
$ 75.00 phone
When equipment is returned, please enter in Value of Returned Equipment. Do not change the initial value of equipment checked out.
Initial Value of Equipment Checked Out
525
Equipment Cost as of
Mon Day Year
9 19 2012
current date
If equipment is returned please note the cost of item below, which will automatically subtract from amount owed. All payments for lost equipment must be made at the payroll office.
Value of Returned Equipment 1
150.00
Equipment Returned Date 1
Mon Day Year
9 21 2012
current date
Value of Returned Equipment 2
Equipment Returned Date 2
Mon Day Year
current date
Please indicate below the amount of money to return to each speedtype in case payroll collects payment from the employee. If equipment is returned, you may adjust the allocations if the form is not processed by Payroll. If the form has been processed, please email Payroll the amount that has been returned.
Speedtype 1
vpfa
Amount 1
450
Speedtype 2
spec
Amount 2
75
Speedtype 3
Amount 3
Total Due
375.00

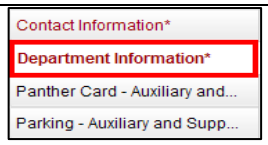
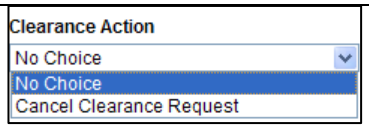
Steps to Enter Information about Returned Equipment

Important: Department cannot accept payment for missing equipment. If employee would like to make a payment please send them to the Payroll Office.

Step 1		• Open form and select Department Tab on left side. See page13.
Step 2		• 1.If status is Submitted for Processing continue below. • 2. If status is In Process by HR or Closed- If department accepts equipment send note to Payroll for refund.
Step 3		• **Equipment Description:** Enter a note in the Equipment Description Field about what has been returned. In this example, a printer has been returned.
Step 4		• **Value of Returned Equipment:** If an employee returns equipment, enter the value of that equipment in Value of Returned Equipment. In this example, equipment worth $150 has been returned. • **Do Not change Initial Value of Equipment** • **Equipment Returned Date:** Enter date item was returned
Step 5		• **Total Due:** In this example, the employee still owes $375 for not returning the laptop and phone. • **Note:** May need to select tab to update totals.
Step 6		• **Save:** Select Save at the top of left corner of the page, above Employee Name. • **Exiting without saving will cause you to lose all information that has been entered since the last save.**

III. Department Tab: Canceling a Clearance Form



Step 1		• Open form and select Department Tab. See page13.
Step 2		• **Clearance Action:** Select Cancel Clearance Request and Save. This will stop the processing of the Clearance Form. • **Note:** Once the form moves to HR Processing only Payroll can cancel the form.
Step 3		• **Save:** Select Save at the top of left corner of the page, above Employee Name.

Chapter 5: Administrative Processing

Administrative areas: Panther Card, Parking, Library, Cashier, Purchasing, Key Control, and Exchange

I. Administrative Areas: General Information

When the form moves to Submitted for Processing, it will automatically be placed in the Administrative areas work list. Each Administrative area will complete an initial review of the Clearance Form indicating any current outstanding equipment and/or fines owed to their area. Once a day if any changes occur to the Clearance Form the employee will receive an updated email, notifying them of any outstanding fines listed on the Clearance Form.

If the employee returns equipment or pays fines after the initial review has been completed, the current status will determine how the Administrative area should process the form (for more information please see Timing and Status Rules below).

It is recommended that each Administrative area review their list at least once a day in order to provide as much notice as possible to the employee about outstanding fines and equipment. If an Administrative area has not completed their initial review and there is less than seven days until the employee's last day of employment, the system will begin sending daily email reminders to the area.

A. **Timing Rules**: Moving from Submitted for Processing to HR Processing

- If all Administrative areas have completed their initial review and the employee owes nothing, the form will move automatically to HR Processing.

- If the above criterion has not been met, the form will stay in Submitted for Processing until it has been open at least ten calendar days after initiation and seven calendar days after the last day of employment, whichever is greater.
  Example 1: Employee's last day of employment is June 30th and the form was created on June 1 it will stay in Submitted for Processing till July 7th if the employee owes money.

  Example 2: Employee's last day of employment is June 30th and the form was created on June 30th it will stay in Submitted for Processing till July 10th if the employee owes money.

B. Administrative Processing Rules for Each Status:

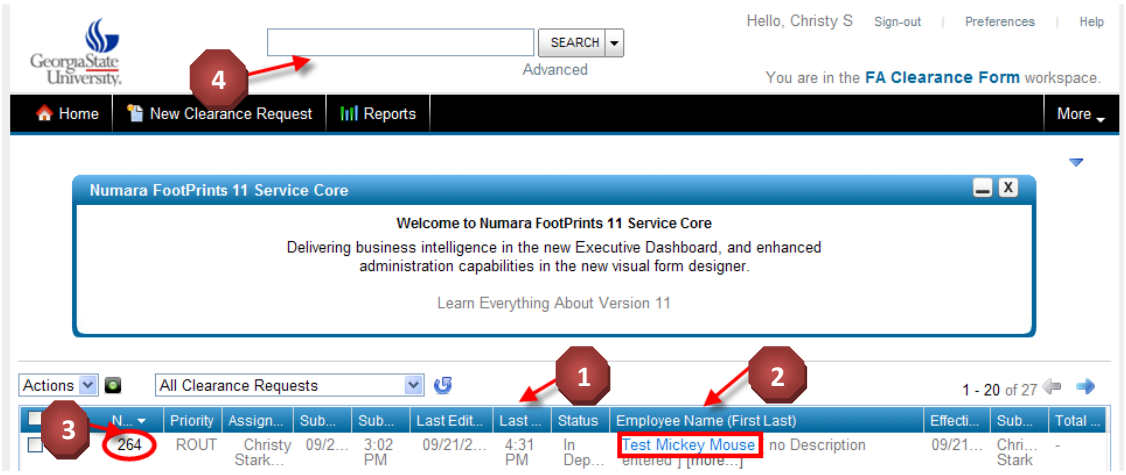
Note: The rules listed below for fines do not apply to Key Control. Key Control cannot take accept payments at their office at anytime. If payment is due for Key Control the employee will be sent to Payroll to make payments.

- **Submitted for Processing**: In this status, Administrative areas can accept equipment and payments for fines at their office. The Administrative areas are responsible for updating the Clearance Form.

- **HR Processing:** In this status, Administrative areas can accept equipment and payment for fines at their office. The form will not be able to be updated by the Administrative areas so an email must be sent to the Payroll office to update the form.

- **Closed:** Administrative areas can accept equipment at their office. If equipment is received, an email must be sent to the Payroll office to update the form and arrange for a refund for the employee. If the employee would like to pay a fine, please send them to the Payroll office.

II. Administrative Areas: Navigation



Finding a Clearance Form:

1. **Display Section:** Displays a list of Clearance Forms that are waiting for your area to process. Select the drop down next to Display to find the Clearance Forms waiting for a specific Administrative Area to process.

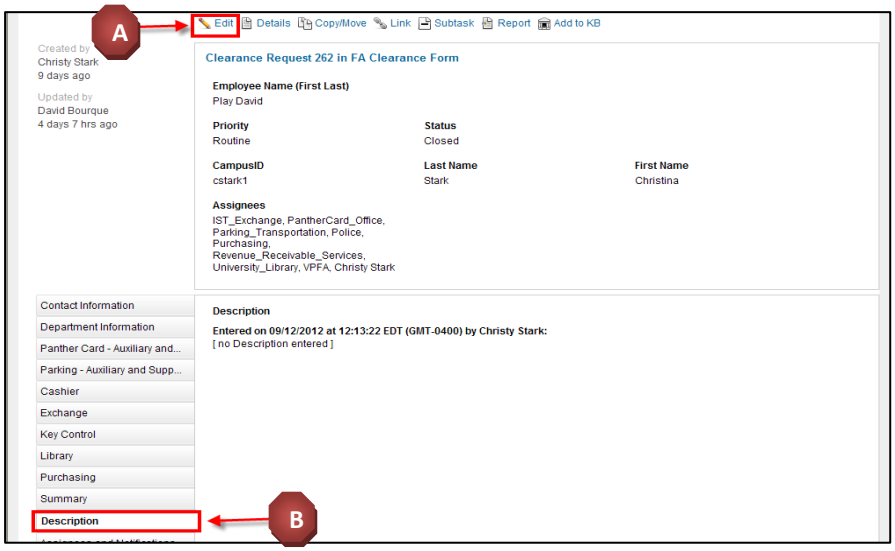
2. **Employee Name:** and other titles above the list help to determine the correct Clearance Form for editing. To sort by column double click the name heading.

3. **Clearance Request #:** This shows a unique number assigned to each Clearance Form. By selecting on the paper and pencil next to the number you can access and edit the Clearance Form.

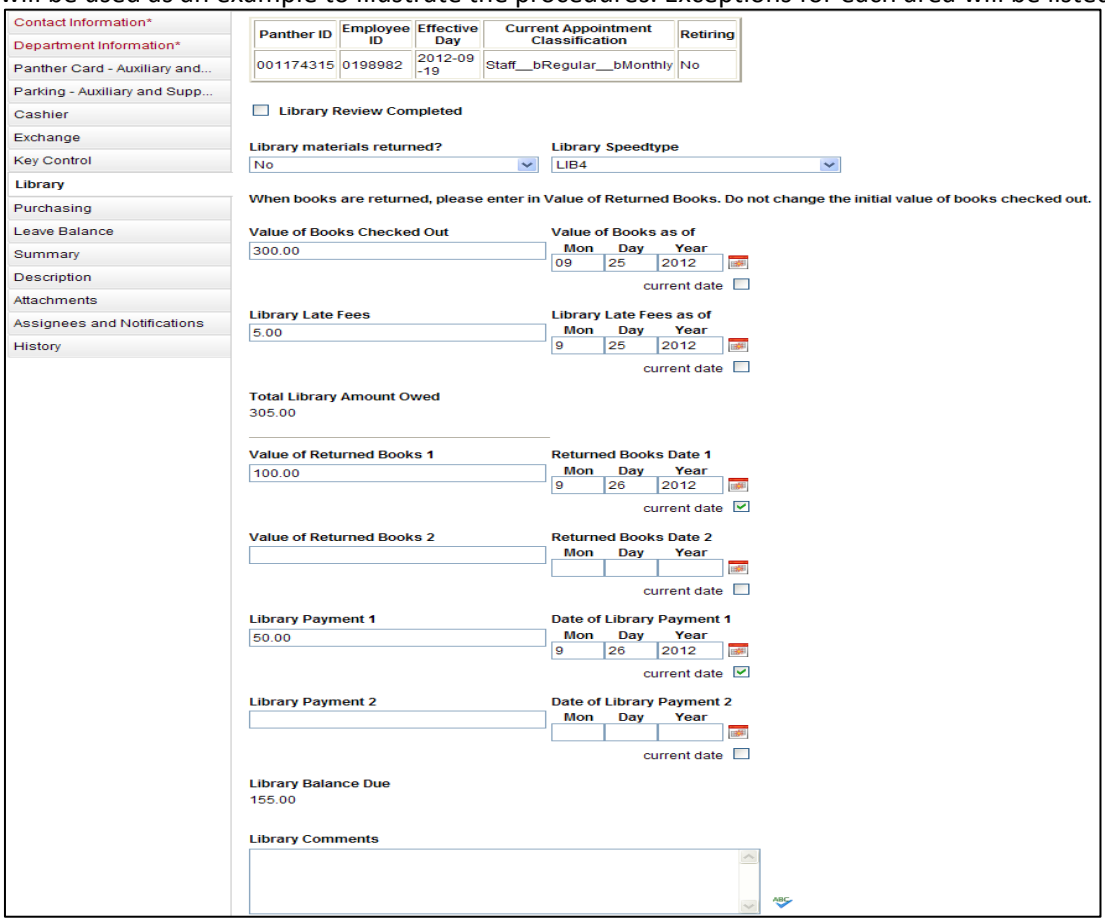
4. **Search:** The search function narrows down the Clearance Form list and displays forms that have had been removed because the initial review had been completed.

Opening Clearance Form:

1. A. Select the Clearance Form number or employee name to open the form. The form will always open on the Description Tab (shown below B) select desired tab to view information.
   Note: If you are if you are not an Administrator or Payroll you will only be able edit the Department and Contact Information Tabs.
2. If edit is shown at the top of the screen A select it to update the Department information tab.

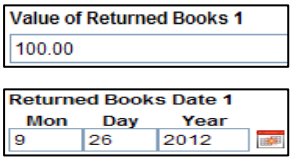
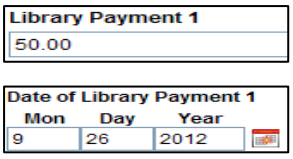
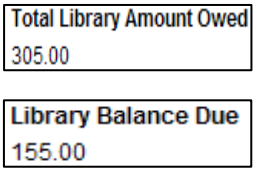


III. Administrative Areas: Initial Entry: All the administrative areas follow a similar process; Library will be used as an example to illustrate the procedures. Exceptions for each area will be listed in on page 19.



Step 1	Library materials returned? No No Choice Yes No N/A	• **Library materials returned:** Select drop-down list • Choose **Yes** if library materials has been returned; if not, choose **No.** If no books have ever been checked out, choose **N/A**
Step 2	Library Speedtype LIB4 No Choice LIB4 Multiple Speedtypes	• **Library Speed type:** Select drop-down list to choose Speed type (indicates where Payroll should journal money) • Library default speed type is **LIB4**
Step 3	Value of Books Checked Out 300.00 Value of Books as of Mon Day Year 09 25 2012	• **Value of Books Checked Out:** Enter the value of all the books currently checked out. Enter the amount the employee will owe if the books are not returned. • **Value of Books as of:** Enter the date of the initial entry. • **Important Note: Do not change the "Value of Books Checked Out" when employee returns books. Enter updates in "Value of Returned Books."**
Step 4	Library Late Fees 5.00 Library Late Fees as of Mon Day Year 9 25 2012	• **Library Late Fees:** Enter the amount of late fees owed. • **Library Late Fees as of:** Enter the date of the late fees.
Note	Total Library Amount Owed 305.00	• **Total Library Amount Owed:** This is the initial amount owed (Sum of Value of Books Checked out and Library Late fees)
Step 5	Library Review Completed	• **Library Initial Review Completed:** Check this box to indicate the initial entry has been completed. Updates can be made after the initial review completed box has been checked. (see page 16).
Step 6	SAVE	• **SAVE:** Select save at top of page to keep changes. **Note:** There is no warning to stop you from leaving the page without saving.

IV. Administrative Areas: Editing Clearance Form Employee returns equipment or makes payment

Step 1	Open Clearance Form	• Open Clearance Form for editing. See page 17 for more information.
Step 2		• **Value of Returned Books 1 &2:** Enter total value of books returned in one day in Value of Returned book field. For example if employee returned two books each worth $50.00 the total in Value of Returned Books 1 is $100. • **Returned Books Date 1&2:** Enter the date the books are returned.
Step 3		• **Library Payment 1&2:** Enter total payment (money) amount in the Library Payment field (this includes payment for books or fines). • **Date of Library Payment 1&2:** Enter the date of the payment.
Note		• **Total Library Amount Owed:** This shows the original amount owed by the employee. • **Library Balance Due:** This shows the original amount owed minus the value of books returned and Library Payments. In this example, the employee originally owed $305, but returned $100 worth of books and made a payment of $50.00. The employee now owes $155 as shown in the Library Balance Due field.
Step 4		• **Save:** Select Save located at top of the page. **Note:** The form will allow you to exit without saving and will not have an error message.

V. Administrative Areas: Differences in Processing Each Administrative Area

The Administrative areas will process the Clearance Form as shown in Sections I-IV. This section describes the differences in processing for each area.

A. Cashier

- Cashier only has ***Outstanding Obligations*** no equipment or books.
- Cashier office must enter speed type in ***Cashier Speed type field.*** If nothing is owed then enter N/A in field.

A. Exchange

- The Exchange will process the form as shown above for the Library.

B. Key Control

- Key Control does not have any late fees and will enter the number of keys checked out originally.

C. Purchasing

- Purchasing has three cards (***Fuel Card, AMEX, VISA***), but no fines. For each card, the Purchasing Office will select: 1.Returned (Yes, No, N/A), 2. Card#, 3. Date

D. Panther Card

- ***Panther Card*** generally has a refund on the card. The employee can only receive a refund at Panther Card Office. Money owed will be entered as a negative amount and when the employee receives a refund, it will be listed as a negative amount in ***Panther Card Payment*** field.

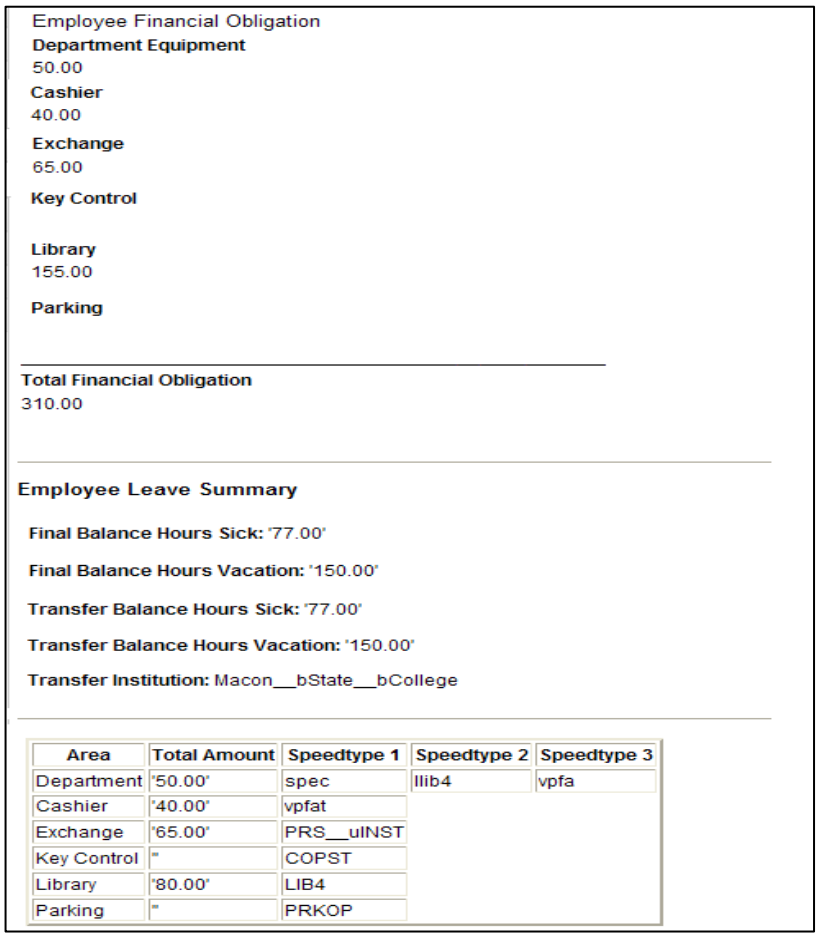
E. Parking

- ***Budget Card*** generally has a refund on the card. The employee can only receive a refund at the Parking office. Money owed will be entered as a negative amount and when the employee receives a refund, it will noted in comment field.
- Parking office will enter the final amount due for automatic deduction in ***Final Amount Due for Parking***

Chapter 6: Additional Tabs

Summary Tab

The Summary tab provides a quick view of the current amount owed to each area. Payroll will also use the comment section to notify an area that money has been journal to their account.



Employee Financial Obligation

Department Equipment
50.00

Cashier
40.00

Exchange
65.00

Key Control

Library
155.00

Parking

Total Financial Obligation
310.00

Employee Leave Summary

Final Balance Hours Sick: '77.00'

Final Balance Hours Vacation: '150.00'

Transfer Balance Hours Sick: '77.00'

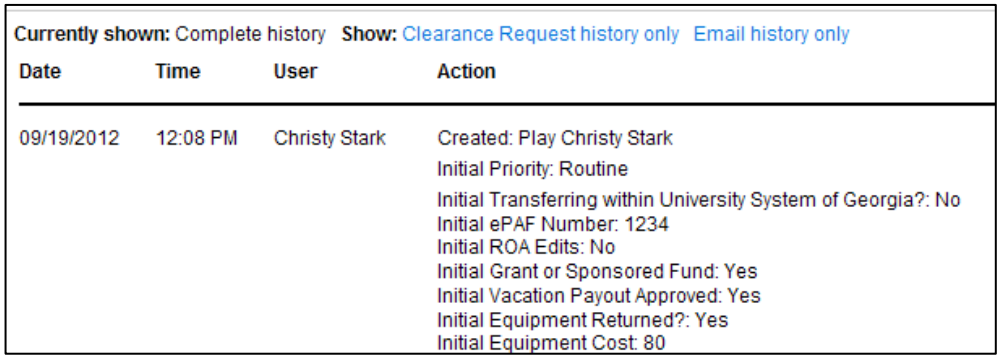
Transfer Balance Hours Vacation: '150.00'

Transfer Institution: Macon__bState__bCollege

Area	Total Amount	Speedtype 1	Speedtype 2	Speedtype 3
Department	'50.00'	spec	llib4	vpfa
Cashier	'40.00'	vpfat		
Exchange	'65.00'	PRS__ulNST		
Key Control	''	COPST		
Library	'80.00'	LIB4		
Parking	''	PRKOP		

History Tab

The History tab provides information about who has taken action on the form and what has been done. It also tracks emails that have been sent by the system.



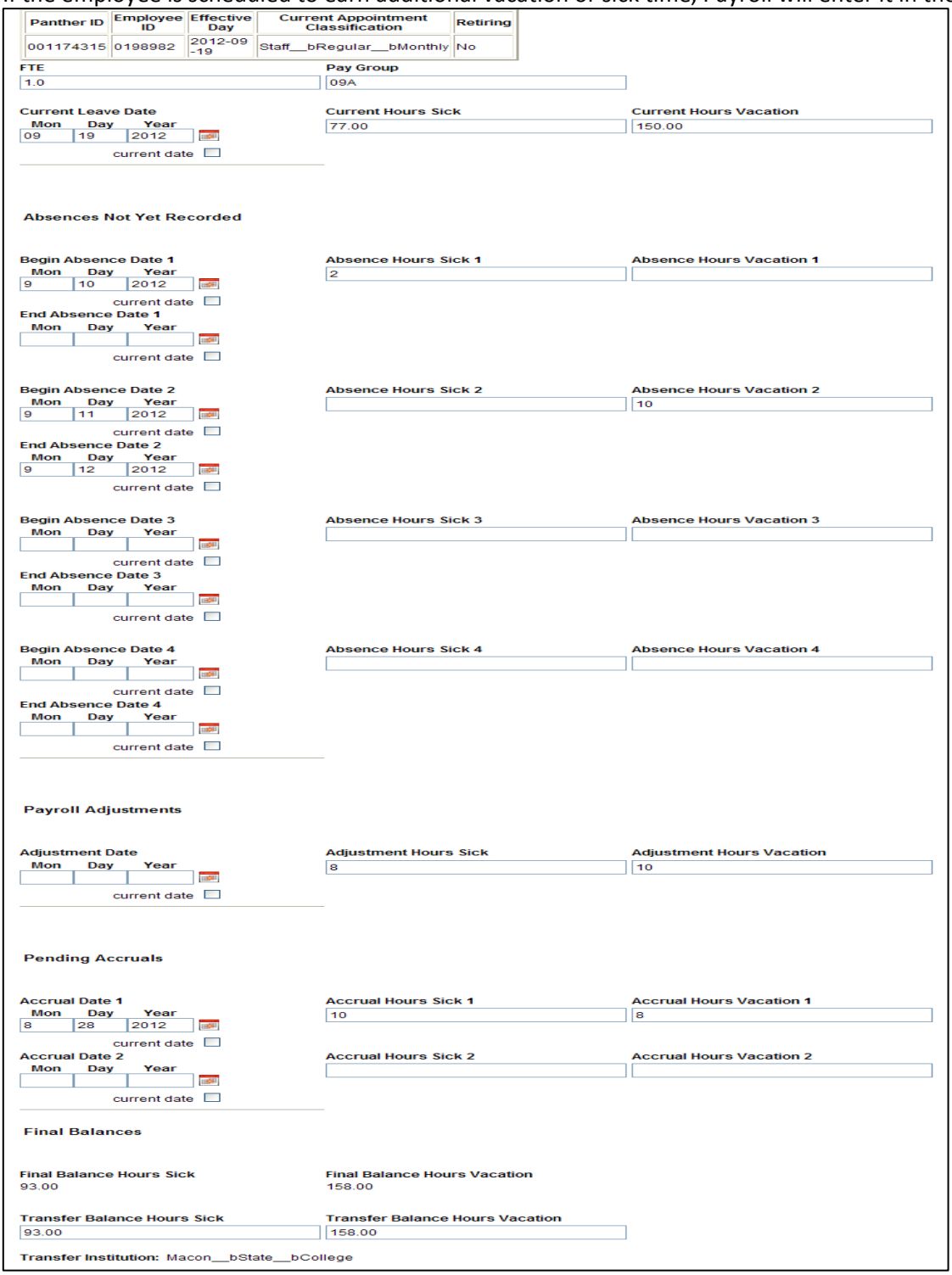
Currently shown: Complete history **Show:** Clearance Request history only Email history only

Date	Time	User	Action
09/19/2012	12:08 PM	Christy Stark	Created: Play Christy Stark Initial Priority: Routine Initial Transferring within University System of Georgia?: No Initial ePAF Number: 1234 Initial ROA Edits: No Initial Grant or Sponsored Fund: Yes Initial Vacation Payout Approved: Yes Initial Equipment Returned?: Yes Initial Equipment Cost: 80

Leave Balance Tab

The Leave Balance tab is used by Payroll to record an employee's final number of hours sick and vacation. This tab will be read only to all users except Payroll. The final balance of vacation and sick hours is calculated using the following formula. If you have any questions about the Leave Balance Tab please contact the payroll office.

1. Payroll will enter the current number of hours of sick and vacation listed in Etime.
3. Payroll will then record any vacation and sick time that is not in Etime. This will subtract from the current number of hours sick and vacation.
4. If the employee has a negative balance it must be subtracted from their paycheck due to tax laws. The amount taken out of the paycheck will be entered into Payroll Adjustment boxes. Since the employee will have to pay for any negative time this will bring the negative hours to zero.
5. If the employee is scheduled to earn additional vacation or sick time, Payroll will enter it in the Pending Accrual.



Panther ID	Employee ID	Effective Day	Current Appointment Classification	Retiring
001174315	0198982	2012-09-19	Staff__bRegular__bMonthly	No

FTE: 1.0
Pay Group: 09A

Current Leave Date (Mon Day Year): 09 19 2012 — current date
Current Hours Sick: 77.00
Current Hours Vacation: 150.00

Absences Not Yet Recorded

Begin Absence Date 1 (Mon Day Year): 9 10 2012 — current date
End Absence Date 1 (Mon Day Year): — current date
Absence Hours Sick 1: 2
Absence Hours Vacation 1:

Begin Absence Date 2 (Mon Day Year): 9 11 2012 — current date
End Absence Date 2 (Mon Day Year): 9 12 2012 — current date
Absence Hours Sick 2:
Absence Hours Vacation 2: 10

Begin Absence Date 3 (Mon Day Year): — current date
End Absence Date 3 (Mon Day Year): — current date
Absence Hours Sick 3:
Absence Hours Vacation 3:

Begin Absence Date 4 (Mon Day Year): — current date
End Absence Date 4 (Mon Day Year): — current date
Absence Hours Sick 4:
Absence Hours Vacation 4:

Payroll Adjustments

Adjustment Date (Mon Day Year): — current date
Adjustment Hours Sick: 8
Adjustment Hours Vacation: 10

Pending Accruals

Accrual Date 1 (Mon Day Year): 8 28 2012 — current date
Accrual Hours Sick 1: 10
Accrual Hours Vacation 1: 8

Accrual Date 2 (Mon Day Year): — current date
Accrual Hours Sick 2:
Accrual Hours Vacation 2:

Final Balances

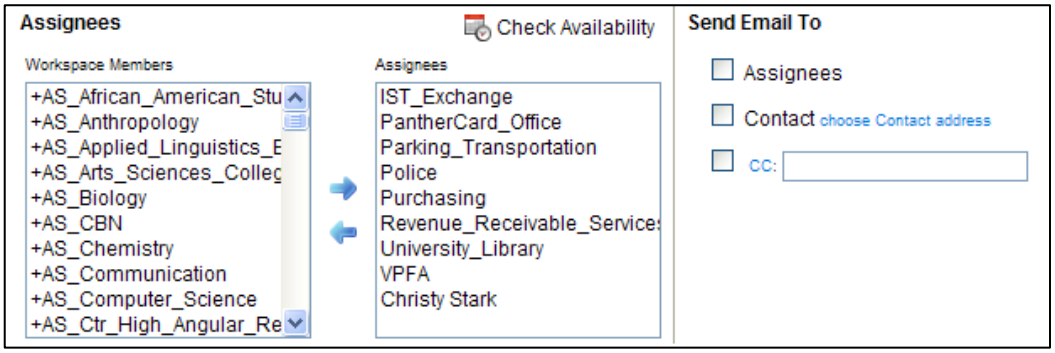
Final Balance Hours Sick: 93.00
Final Balance Hours Vacation: 158.00

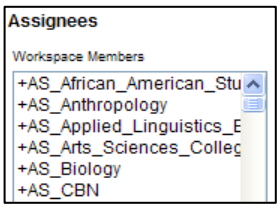
Transfer Balance Hours Sick: 93.00
Transfer Balance Hours Vacation: 158.00

Transfer Institution: Macon__bState__bCollege

The Assignees and Notification tab is used to assign people access to the Clearance Form that normally would not be able to see and process the form. Access is given automatically to the department that created the form and all Administrators and Payroll. This tab will only need to be used if additional people need to access to the form.

Example- If an employee of the Chemistry department also worked on a grant in the Biology department, the Chemistry department may need to assign additional access to the Biology to sign off on the form.



Notes	The **Workspace Members** field lists everyone who has security access to Clearance Forms other than their own. The **Assignees field** lists all employees or areas that will have access to that specific Clearance Form.	
Step 1		• Under Workspace Members field, find the department you wish to assign. • Expand the department and highlight a single person or choose Assign Team to give everyone in the department access.
Step 2		• Select the arrow facing right to move the person or department to the Assignees group, providing access to see the form.
Step 3		• Click the left-pointing arrow to transfer the selected **Assignees** back to the **Project Members** box.

Appendix: Value of Equipment

How to Determine the Depreciated Value of Equipment

The Board of Regents' Business Procedure Manual states that the depreciated value of equipment should be determined by the straight-line depreciation method (historical cost, divided by useful life),

Board of Regents of the University System of Georgia (2010, June 16). *Business Procedures Manual 7.7.3 Depreciation Methodology*. Retrieved from http://www.usg.edu/business_procedures_manual/section7/

The historical cost of an item is the amount the equipment cost when it was acquired by Georgia State University.

The useful life of equipment should be calculated in months and can be found in the Board of Regents Procedure Manual section 7.15.3. **Board of Regents of the University System of Georgia** (2010, June 16). *Business Procedures Manual 7.15*.3 Useful life of Capitalized Assets. Retrieved from http://www.usg.edu/business_procedures_manual/documents/useful_lives_capitalized_assets.pdf

Important Note: There is a minimum charge of 10% of the historical cost; therefore the charges for equipment taken by employees will be the depreciated value or 10% of historical costs, whichever is greater.

Example:

A video projector was bought for $1000 and has a useful life of 5 years (60 months). The video projector was bought 2.5 years ago (30 months) ago.

Historical Cost= $1000

Useful Life= 30 months used/ 60 months total useful life= ½ useful life

$1000 * ½= $500 Current Value

Appendix: Letter for Employee to Explain the Online Clearance Form

Below is a letter that departments can hand out to employees to help them understand the Online Clearance Form. This letter can also be found on the website: http://www.gsu.edu/hr/payroll/online-clearance-form.html

All university property must be returned and all fines and advances paid before your last day of employment or it may be deducted from your last paycheck or vacation payout. If there are insufficient funds, you will be sent an invoice indicating the amount due.

The Clearance Form tracks property and payments that are due to the University when an employee terminates employment. With the Online Clearance Form, instead of walking a paper form around campus, you will receive emails updating you about any amount you owe. The emails will list the total amount due to each area. When you return equipment and pay outstanding balances you will receive an updated email the next day indicating the adjustment on your account.

The Online Clearance Form emails will automatically go to your campus email address. If you wish to have the emails sent to another address, please provide this to your home department.

You can view additional information about monies and property you currently owe at: https://helpdesk.gsu.edu/MRcgi/MRentrancePage.pl Note: To log in you will need your Campus ID and password.

Important Information:

Benefit Information: Benefits information can be obtained at: http://www2.gsu.edu/~wwwhre/benefits/ClearanceInfo.pdf or One Park Place South, 3rd Floor, 404-413-3302

Parking (404) 413-9500 Suite 200, University Bookstore Bldg., 66 Courtland Street

A. **Parking Card Return**: All parking cards must be returned by last day of employment or there will be a $25 fee per card. When you return your parking card you will receive a token to let you out of the parking garage.
B. **Budget Card Refund:** Refunds for the Budget Card are only available by going in person to the Parking Office.
C. **Total Amount due:** Amount owed for parking may include automatic deduction and fees if parking card is not returned.

Panther Card (404) 413-9508 Suite 200, University Bookstore Bldg., 66 Courtland Street

A. **Panther Card Return**: Panther Cards should be returned upon ending employment.
B. **Panther Cash Refund**: Refunds for Panther Cash are only available by going in person to the Panther Card office.

Library (404) 413-2820 Circulation Desk, Library North, 100 Decatur Street

A. **Total Amount Due-** All library books and fees are due by last day of employment. The value of books checked out and not returned along with any fines are added to the total amount due by last day of employment.

Key Control (404) 413-3233 Police Entrance, One Park Place, 15 Edgewood Ave

A. **Key Checked Out-** As of July 1, 2011 Key Control will charge for keys not returned by last day of employment.

Cashier (404) 413-3251 Suite 101, Sparks Hall

A. **Funds and Advances issued in your name:** You are responsible for returning any Impress Funds, Project Advances, Travel Advances, or Petty Cash Funds by your last day of employment.
B. **Forms to Complete:** Project Advance or Impress Fund- The Project Advance/Impress Fund Closing Form
Petty Cash Fund or Travel Advance- The Deposit Remittance Form

Purchasing (404) 413-3150 Suite 901, One Park Place, 15 Edgewood Ave

A. **AMEX and Visa Purchasing Cards-** Returned card to the Purchasing office.
B. **Fuel Card-** Pin number will be deactivated upon termination.

Exchange (404) 413-4700 Suite 106, Library South, 100 Decatur Street

A. **Total Amount Due-** All equipment and late fees are due by last day of employment. The total value due includes the value of equipment checked out if not returned and late fees.

Appendix: Example of Automatic Email Sent to Employee

When a Clearance Form is in the status of Submitted for Processing it will send an email to inform the employee of what is currently owed on the form. The system will automatically send an email once a day if any changes occur on the form.
Important: If the employee's Campus Email address or Campus ID will be turned off immediately, please update the Clearance Form with a valid email address for the employee.

Dear Christina Stark,

All university property must be returned and all fines and advances paid before your last day of employment or it will be deducted from your last paycheck and/or vacation payout. This and subsequent emails will provide information about how much you owe to each campus office listed below.
You will receive email notifications to your current email address on record as updates are made. If this email address will be discontinued, please provide your home department an email address where you can continue receiving these updates.

If any outstanding property is not returned and/or payments for any fines, impress funds or project/travel advances are not paid by the last day of employment, the total amount will be deducted from your final paycheck and/or vacation payout. If there are insufficient funds, you will be sent a letter indicating the amount due.

You can also view this and additional information at: Click here to view Issue in Browser.
Note: To log in you will need your CampusID and password.

Please note that important benefits information can be obtained at:
http://www2.gsu.edu/~wwwhre/benefits/ClearanceInfo.pdf or One Park Place South, 3rd Floor, 404-413-3302

Also an anonymous exit survey maybe emailed to you. The information gathered from the survey is used for employee retention purposes only.
If you have questions please contact the corresponding office listed below.

Campus Office	**Current Amount Owed** (A negative amount indicates a refund. Refunds will only be issued at the originating office not Payroll.)	**Location & Contact Information**
Home Department	150.00	Finance & Adm. Vice President
Parking **Note: amount listed may include automatic deduction**	350.00	Suite 200, University Bookstore Bldg 66 Courtland Street (404) 413-9500
Panther Card		Suite 200, University Bookstore Bldg 66 Courtland Street (404) 413-9508
Library	200.00	Circulation Desk, Library North 100 Decatur Street (404) 413-2820
Cashier	0.00	Suite 101, Sparks Hall (404) 413-3251
Purchasing	Fuel Card Deactivated = Not Processed AMEX Card Returned = Not Processed VISA Purchasing Card Returned = Not Processed	Suite 901, One Park Place 15 Edgewood Ave (404) 413-3150
Key Control	50.00	Police Entrance, One Park Place 15 Edgewood Ave (404) 413-3233
Exchange	0.00	Suite 106, Library South 100 Decatur Street (404) 413-4700